

CALIFORNIA STUDENT AID COMMISSION

Overview of the WebGrants System Enhancements

January 2003

BACKGROUND

WebGrants was released to schools in January 2000 as a replacement for PC FAPS; this system is now referred to as Legacy WebGrants and is still available to schools. In July 2002, a new log-on page was released along with new functionality, including:

- User Administration
- GPA Upload/Entry
- School Choice Simulator

All Legacy WebGrants screens are being redone and the Legacy system is scheduled to be completely replaced by the middle of this year. Update functions are being added for student demographics, school demographics, and cost estimate worksheets; enhanced functionality will be available for payments and reconciliation.

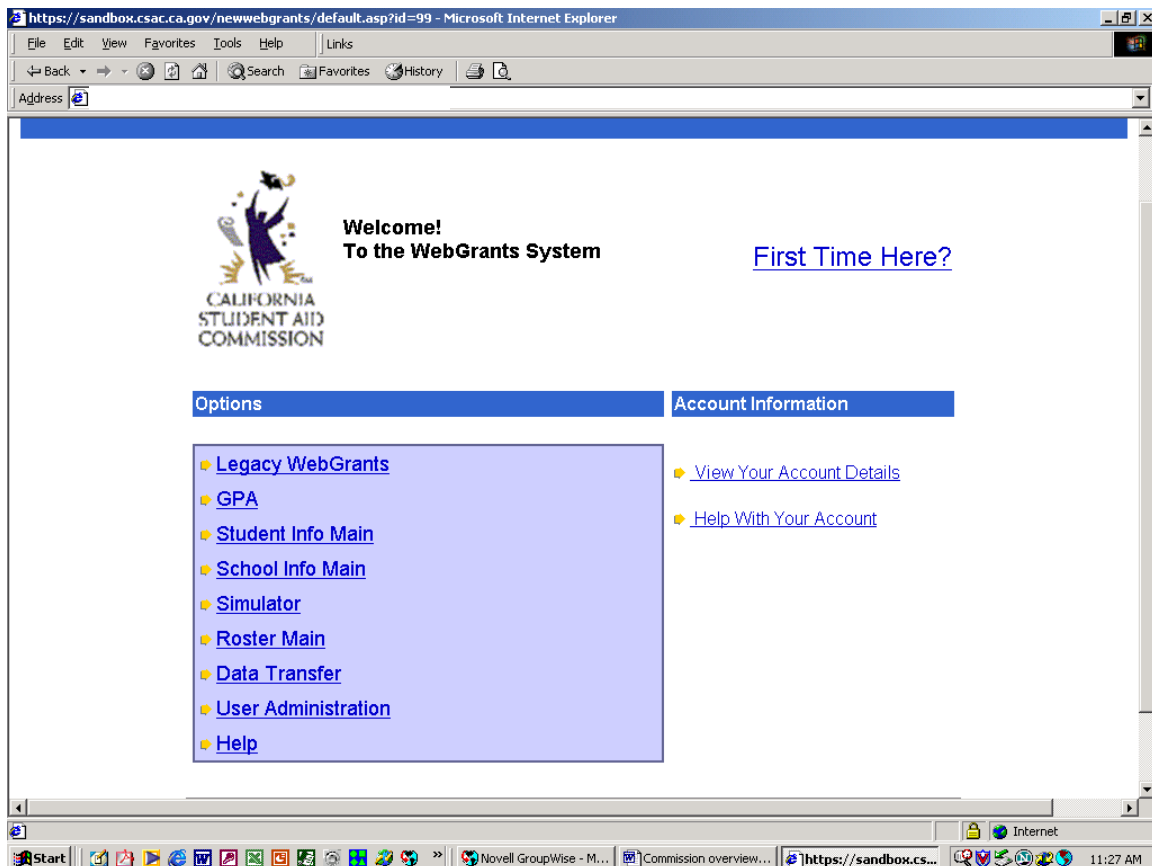
FEATURES

- ⇒ Easy to navigate
- ⇒ Menu driven
- ⇒ On screen guidance
- ⇒ Clean layout – easy to read
- ⇒ Multiple sort and ordering options
- ⇒ Customizable rosters and reconciliation reports

MAIN MENU **

In addition to being the primary navigation screen, the Main Menu allows a user to view their account details, such as user name, address, email address and phone number. Authorized users also have the ability to change their password. The “First Time Here?” link takes the user to a copy of the current user guide and help files.

The user guide will be updated as new functions are released. When logging into the system, only functions for which the user has been granted access will be displayed. Access is granted at the campus level by the school’s WebGrants Administrator.



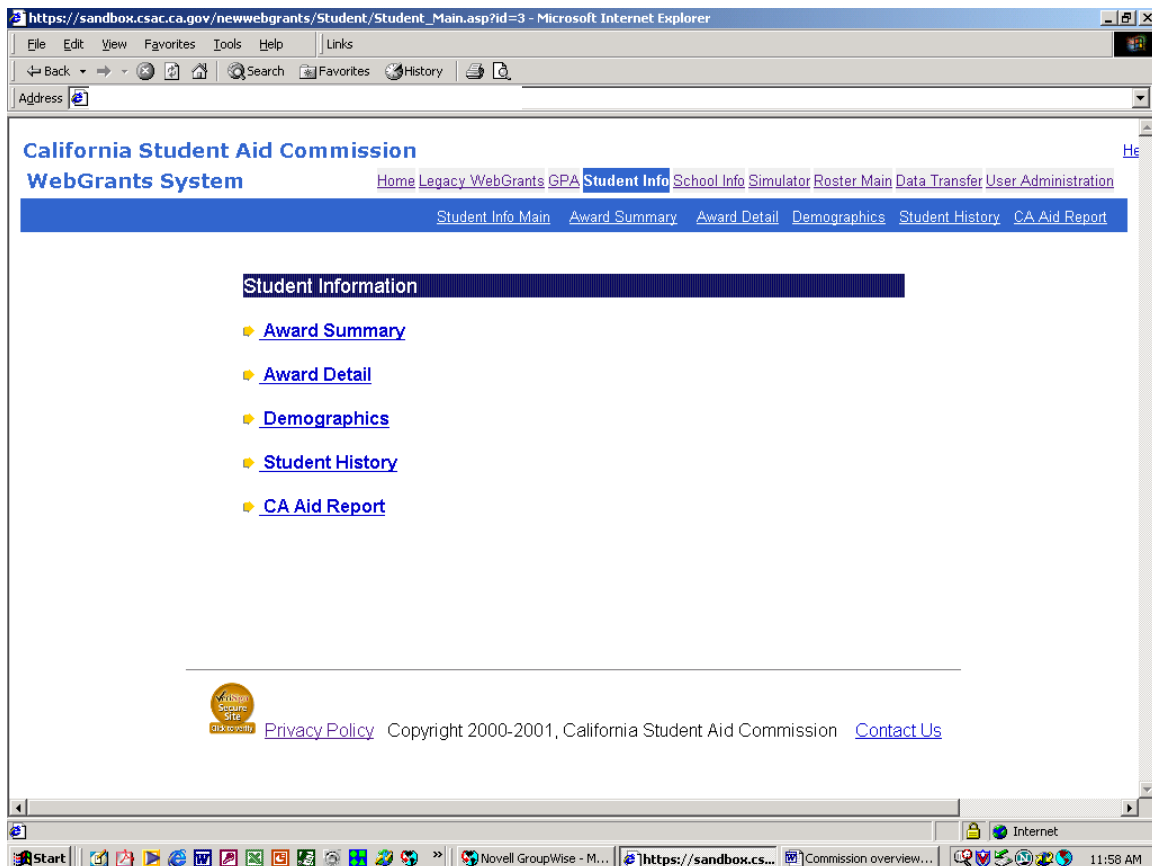
*** The School based user administration system determines what type of access people on their campus should have. Only functions that the user has been granted access to will appear on the menu.*

MENU STRUCTURE

Each of the above menu items has a sub-menu that lists the individual functions or screens. For example, the GPA menu has three options: Upload GPAs, Add GPAs and Change/View GPAs. Within each menu, the user can navigate to other screens within the menu or change to another sub-menu. It is not necessary to return to the Main Menu.

STUDENT INFORMATION

The Student Information area contains data specific to a single student. As the user navigates between screens the social security number travels with them. Each screen presents a different view of the student's award status and varying degrees of detail. The data has been streamlined to organize and present the data in a useful manner. In addition, the number of total inquiry screens has been reduced and update functionality for student address changes has been added.



The Student Information Menu contains five screens. The following is a brief description of each screen and its functionality:

Award Summary

This is the primary student information screen and replaces the current IGLS screen. The data elements contained are the same; however options for sorting various data columns has been added along with a more sophisticated help feature.

Award Detail

As the name indicates, this screen provides additional data regarding a student's award. This screen combines the current IGAI and IGRC functions so that schools don't have to access different screens for new vs. renewal students. The data elements have been reordered to provide more logical groupings. Where possible, acronyms and abbreviations have been replaced with plain English.

Demographics

The INAH screen has been replaced by a demographic function that allows schools to change a student's address and phone number in a real-time environment. Changes to a student's name, date of birth or social security number must still be provided to the Commission with appropriate documentation, however, a link to a printable form will be made available on the demographics screen. In addition, a link to the Grant Record Change form (G-21) will also be available. The schools can complete the form on-line and transmit it to CSAC for manual update.

Student History

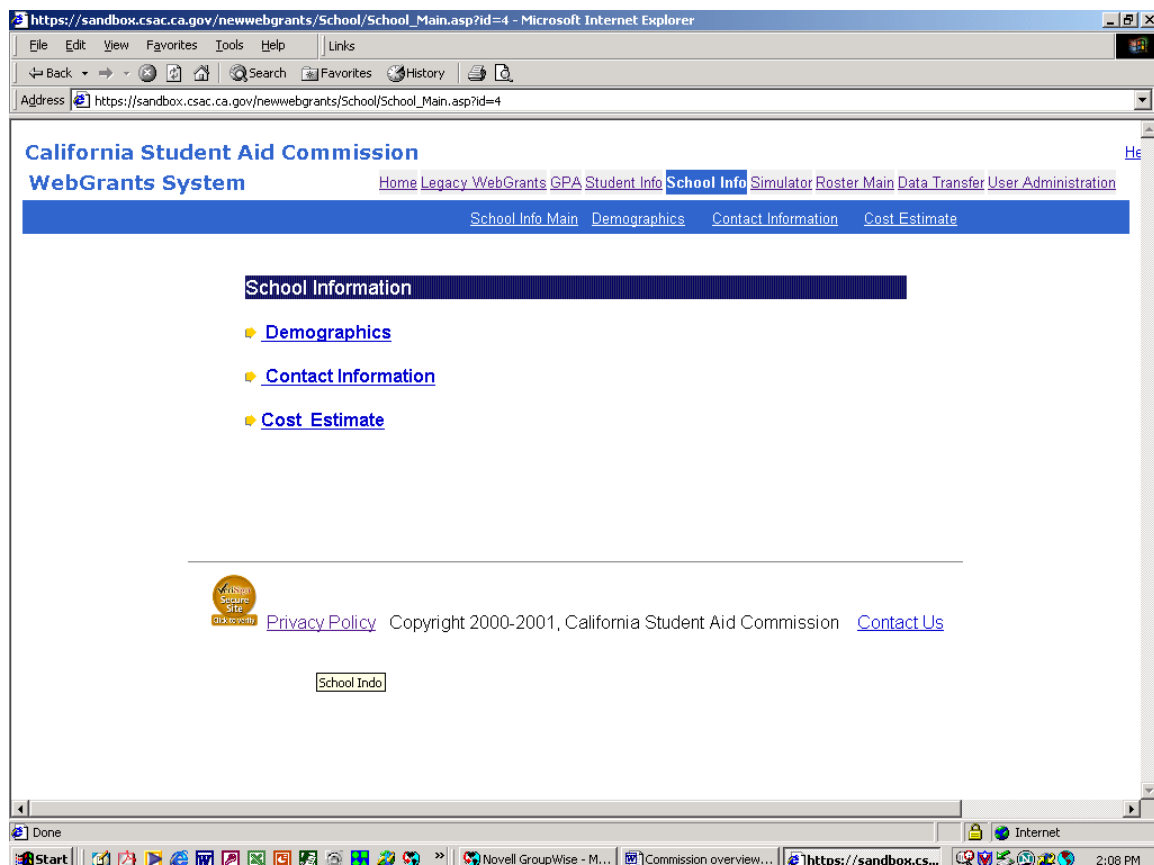
Replacing the ISHS screen, the payment history screen provides the details of all payments a student has received and assists the school in tracking remaining eligibility and if a student has received payment from another institution.

CA Aid Report

This screen contains the same data that the student receives on their award letter (CAR) from the Commission so that the school can view the same information that the student has on their correspondence. This replaces the current ICAR screen and will provide data specific to the type of award the student has received.

SCHOOL INFORMATION

The School Information area allows school users to view and update information pertaining to their campus. Legacy WebGrants has one screen (IID1) that lists the school's address and contact information. The screens are inquiry only. The new screens will allow users to update the information on-line and then submit to CSAC for approval. Commission staff will review and approve all school submissions prior to update.



Institution Demographics

The Legacy WebGrants screen for Institution Demographic Inquiry (IIDi) will be replaced with new Web screens that allow authorized school users and CSAC users to enter changes to school address. CSAC users will have access to similar screens where they can review pending changes and then approve them.

Institution Contacts

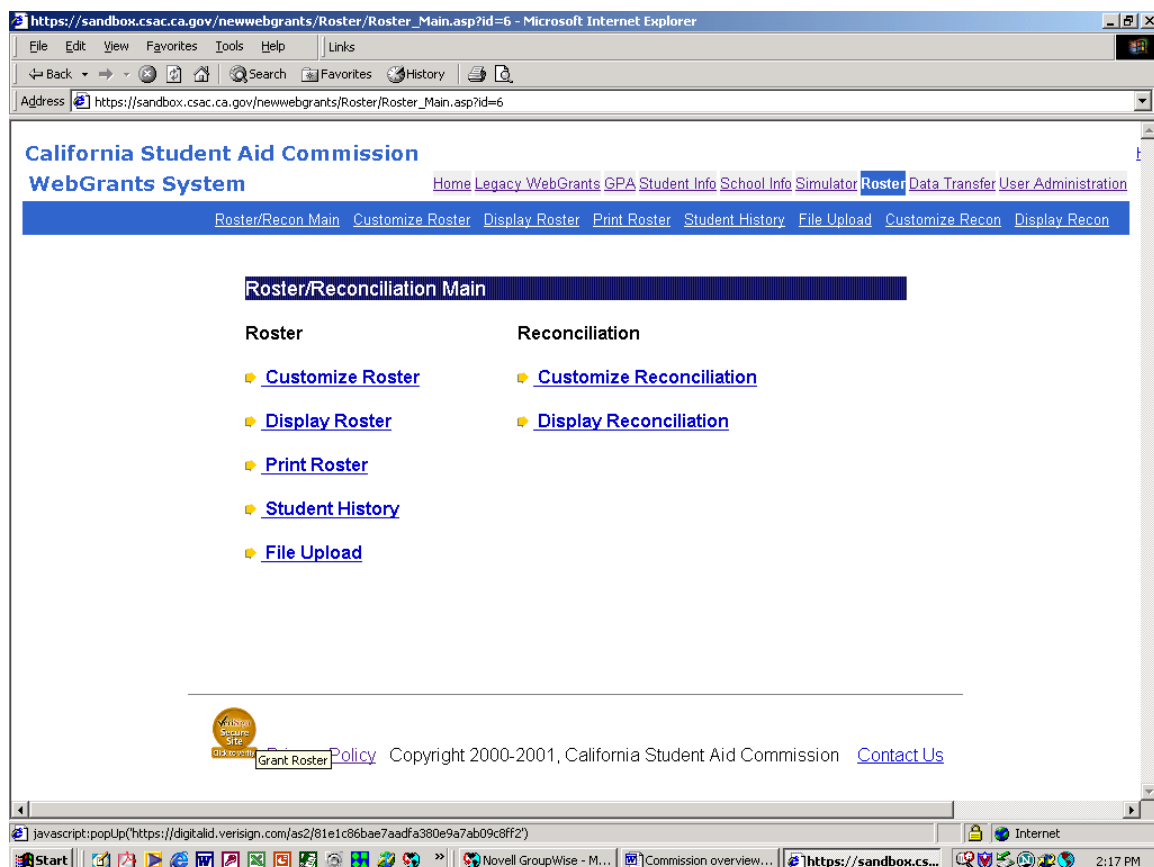
This screen will also replace part of the IIDi functionality and display the contact name, address, telephone and email for key staff. This screen will be updateable by authorized school users and will utilize the same approval process as the Institution Demographics screen.

Cost Estimate

Schools provide cost information annually that is used by CSAC to determine the financial need and award amounts for new Cal Grant applicants. This screen will allow schools to enter and submit these cost estimates to CSAC electronically. Commission staff reviews and approves the data reported before the changes are used for processing.

ROSTER/RECONCILIATION

The roster is perhaps the most anticipated new feature. Over 300 hours of staff time went into the initial system requirements and specifications. The roster design allows users maximum flexibility in the way they view their payment records. The reconciliation reports are designed in a similar manner to the roster and provide new reporting and reconciliation capabilities for schools.



Customize Roster

There have been requests from both external and internal users to improve the current grant roster processing. Institutions find the reports difficult to manage because they have no way to filter or sort the information to suit their internal processes. One of the most common complaints is that students appear on the grant roster without ever appearing at the school. The screen addresses these complaints and allows users to display only key data elements and to filter and sort data. Each user can create up to five customized rosters.

Display Roster

The Display Roster screen combines the functionality of both MSCA and MSCL and allows users to view either the CSAC Standard Roster or any of the custom rosters that they have designed. Payments are processed from this screen. In addition, users can now view a student's payment history directly from this screen. Users can also add students to their roster or access individual student records without moving to a different screen.

Print Roster

Schools can print their roster in its entirety on their own schedule rather than receiving monthly printouts from the Commission. The roster will print at the school site on 8.5x11 paper.

Student History

Schools can access the student history screen from multiple menus. This is the same screen described in the Student Information section. In addition, schools can link to an individual student's payment history from the display roster screen.

File Upload

Schools will use this screen to upload electronic payment files directly to the Commission. No new functionality has been added.

Customize Reconciliation

This screen will function in a manner quite similar to the customize roster screen. The user will be able to sort and filter payment data to assist them in balancing their Cal Grant payment account to the Commission's records.

Display Reconciliation

This is new functionality. There are not any current web screens that assist a school in reconciling their payment records. The screen will provide both summary and detail level data. In addition, a standard report filter has been designed to allow schools to verify the data that comprises specific sub-totals on their reports.